

Alternative Contracting Task Team Meeting - Notes

Date: March 31, 2011

Place: Turnpike Headquarters (Turkey Lake Plaza)
Auditorium A
Video Conference Bridge No. 3 (850-414-4660)
(Central Office Room 348)

Time: 9:30 am – 1:30 pm

Agenda items:

Introductions & Opening Remarks

New Business:

1. Alternative Technical Concept (ATC) Process – (Brian Blanchard)

Notes: Mr. Blanchard advised the group that Proposal Evaluators may (and are encouraged to) participate in ATC meetings held on D/B projects. It was noted that it is important for the department to ensure functional area experts attend the ATC meetings whenever possible. Best practices related to the ATC process were discussed by several districts. District participants were polled for the purpose of identifying whether a single department representative or functional area experts were involved in the ATC process at the district level.

2. Utility Issues – (Dan Metz)

Notes: Mr. Metz shared the following Issues & Suggestions with the group. Prior to the ACTT meeting these were discussed with the department. Tom Bane indicated he is currently working on responses and/or proposed modifications to current processes in an effort to address these issues. It was suggested that Mr. Bane discuss these with the D/B Utility Subcommittee. Also discussed was a proposal to allow the Utility Work by Highway Contractor agreement to be utilized on D/B projects where appropriate. District 2 noted that they currently utilize this process on select D/B projects.

Utility Relocation Issues

Issues:

- *It can be difficult to identify all utilities on a project site regardless of whether the utilities are compensable or not.*
- *UAO's may not always cooperate with a shortlisted or selected DB team. If they do cooperate, the UAO may not know what they have on a site.*
- *UAO's can be reluctant to estimate a cost or provide a schedule. Costs and schedules may change even if they are provided.*
- *There is not always enough project information for the UAO to provide an accurate work schedule.*
- *UAO's cannot always turn off or de-energize utility when they said they could.*

Suggestions:

- *FDOT should maintain a project by project contingency fund for all compensable utility work.*
- *DB Firms will maintain the responsibility for coordinating and scheduling the utility work.*
- *FDOT should initiate meetings between utilities and shortlisted DB Firms.*
- *Consider utility impacts in the grading criteria when applicable.*
- *Projects with significant utility issues relative to the remainder of the job may not be the best candidates for design-build.*
- *Revise specification which appears to make the DB Firm liable and responsible for any and all unknowns. Separate out utilities from other potential unknowns.*
- *Allocate more money for SUE prior to DB RFP (during original design or DB Criteria Package preparation process).*

3. Proposal Requirements – (Dan Metz)

Notes: Mr. Metz shared the following Issues & Suggestions with the group. Prior to the ACTT meeting these were discussed with the department. Based on this discussion the department is reviewing current process and documents governing D/B projects for the purpose of identifying areas of improvement.

Proposal Requirements/Grading

Issues:

- *Proposal requirements do not always correspond with grading criteria.*
- *Range of scores is typically very narrow letting price control selection results in many cases.*
- *Grading between Districts varies and is inconsistent.*

- *Grading does not always reflect the value of a unique or innovative idea indicting a possible lack of understanding of the corresponding financial value.*
- *Proposal requirements do not always match the simplicity or complexity of the job. Simple design-build projects may not need QMP's, résumés or extensive write-up's.*

Suggestions:

- *FDOT could assign graders that have the ability to equate proposed project enhancements with a corresponding financial value.*
- *FDOT could develop grading guidelines to help reviewers through the evaluation process.*
- *Graiders should grade the proposals with a goal of determining best value.*
- *Revise the boilerplate RFP so proposal requirements are consistent with grading criteria.*
- *Write RFP requirements to reflect complexity of the project.*

4. Proposal Grading – (Dan Metz)

Notes: See item 3 above.


5. Shortlist / Longlist Criteria – (Michael Turner)

Note: FDOT has created Selection Package forms specific to Design-Build (Form 375-030-2B).

Notes: Mr. Turner shared with the group several concerns he has observed in the areas of Shortlist, Longlist and Selection criteria utilized by the department during the procurement process for select D/B projects. It was noted that the department recently created Selection Package forms specific to D/B projects which will eliminate instances such as the ones presented from occurring in the future. The Design-Build Selection Package Form is available on the Internet for firms to download from the following link:

<http://formserver.dot.state.fl.us/capture/listings/FormListing.aspx?ListType=FormNumber>

The form number is 375-030-2B.

375-030-2B	Design-Build Selection Package	PROCUREMENT OFFICE	02/2011	 [HTML Form]
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6. Cost Savings Initiative Proposal – (David Sadler)

Notes: Mr. Sadler shared with the group that the department is considering allowing the CSI specifications and process to be

utilized on D/B projects. The pros and cons of moving forward with this proposal were discussed. It was noted that FDOT should coordinate with FHWA to ensure there are no federal provisions in place which would prohibit the use of the CSI process on D/B projects. Derek Fusco (FHWA) was asked to investigate this and subsequent to the meeting reported that no federal prohibitions which would disallow CSI's to be used in the D/B process

7. Open Floor

Patrick Stanford requested a clarification as to the process for submitting department questions to shortlisted D/B firms in advance of the Q&A session. It was noted that the RFP and D/B guideless address this as follows:

RFP (Section III: Threshold Requirements; Subsection E: Question and Answer Session:

E. Question and Answer Session

The Department may meet with each Proposer, formally, for a Question and Answer session. FHWA shall be invited on FA Oversight Projects. The purpose of the Q & A session is for the Technical Review Committee to seek clarification and ask questions, as it relates to the Technical Proposal, of the Proposer. The Question and Answer sessions will occur a minimum of two (2) weeks after the date the Technical Proposal are due, and be part of the Overall Technical Proposal Scoring. The Proposers shall be given a minimum of one (1) week after the Question and Answer session to submit their Price Proposal. The Department will terminate the presentations promptly at the end of the allotted time. The Department may tape record or videotape all or part of the presentations. The Question and Answer session will not constitute "discussions" or negotiations. Proposers will not be permitted to ask questions of the Department except to ask the meaning of a clarification question posed by the Department. Within one (1) week of the Q&A session, the Design-Build Firm shall submit to the Department a written clarification letter summarizing the clarifications provided during the Q&A session. No additional time will be allowed to research answers.

The Department will provide some (not necessarily all) proposed questions to each firm as it relates to their technical proposal approximately 24 hours before the scheduled Question and Answer Session. No supplemental materials, handouts, etc. will be allowed to be presented in the Question and Answer Session.

D/B Guidelines (Section 3.18:

The Department may chose to meet with the Design-Build Firm, formally, to further clarify the Selection or any part of the Technical Proposal. This will be conducted as a 60-minute Question and Answer (Q&A) session facilitated by the Department. The Department will provide questions to each Design-Build Firm as it relates to their Technical Proposal no less than 24 hours before the scheduled Q&A session.

Amy Scales suggested a change to the boilerplate RFP to require D/B firms to indicate as part of their Technical Proposal whether or not the Schedule submitted along with the Technical Proposal is based on Calendar Days or Work Days. SCO will review the current boilerplate RFP documents and incorporate changes as appropriate.

8. Date, time and place for next meeting? *September 2011*